



MPDR DELEGATE ACCESS For SUPERVISING PROVIDERS

Please read “Introduction to MPDR Delegate Access” before proceeding.

HOW TO USE THIS DOCUMENT

Please review this entire document before logging in to the MPDR. Individual pages can be used as reference sheets or checklists while completing tasks in the MPDR’s online service. Each task is illustrated with screen shots, and screen functions are explained.

IMPORTANT FACTS ABOUT BEING AN MPDR SUPERVISING PROVIDER

- A Supervising Provider *must be a Registered User of the MPDR* and must log in to the MPDR’s Enroll/Manage Delegates portal to create an online relationship with each of the individuals to whom search authority is being delegated. A Registered User is a prescriber or pharmacist who has completed required training, created an online registration to search patient history, created an ePass Montana account, and successfully logged in to search patient history. To become a Registered User, go to www.MPDR.mt.gov and follow the on-screen instructions for registering to search patient history.
- Pharmacists may only delegate their MPDR search authority to licensed Pharmacy Technicians and licensed Pharmacy Interns.
- Prescribers may delegate their MPDR search authority to any HIPAA-trained staff member.
- Supervising Providers are responsible for monitoring the MPDR searches their Delegates make, including relationships created by an MPDR Facility Manager or MPDR Department Manager.
- Supervising Providers are also accountable for how their Delegates use or release information obtained from the MPDR. The MPDR’s Delegate Management functions provide tools for Supervising Providers to monitor their Delegates’ MPDR searches.
- Supervising Providers can override a Delegate Relationship that was create by an MPDR Facility Manager or an MPDR Department Manager. The Supervising Provider always has the final authority about who is authorized to search the MPDR on their behalf.
- Supervising Providers are responsible for promptly terminating an online Delegate Relationship when the staff member leaves employment, takes an extended leave of absence, or transfers to a position that does not require access to the MPDR.
- Supervising Providers will receive the following email notifications from the MPDR’s online service when an action has been taken by the Supervisor or by an MPDR Facility or Department Manager:
 - A relationship has been created with a new Delegate.
 - An active relationship will expire in 30 days or in 7 days.
 - An active relationship has expired or been terminated.
 - An inactive relationship has been re-activated.
 - The Delegate’s MPDR access has been blocked by the Board of Pharmacy.
- Supervising Providers are encouraged to use this document as a resource for information and checklists while managing Delegate Relationships.
- Supervising Providers can contact the MPDR for assistance by emailing pdassistance@egovmt.com or by calling 406-449-3468, Option 0.

ADDITIONAL CONTENTS OF THIS DOCUMENT

Click on links below to view the related sections:

Page 2: [How to log in to Manage Delegates](#)

Page 2: [How to manage an MPDR account](#)

Page 3: [Overview of the Delegate Management screen](#)

Page 4: [How to create new relationships](#)

Page 5: [About relationship end dates](#)

Page 6: [How to manage existing relationships](#)

Page 6: [How to reactivate expired relationships](#)

Page 7: [How to monitor Delegate activity](#)

Page 8: [Troubleshooting and frequently asked questions](#)



MPDR DELEGATE ACCESS For SUPERVISING PROVIDERS



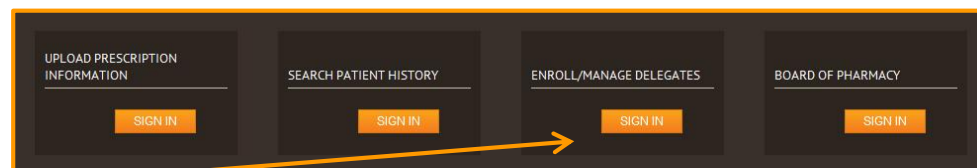
**MONTANA PRESCRIPTION
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Check the history. It matters.

HOW TO LOGIN TO MANAGE DELEGATES

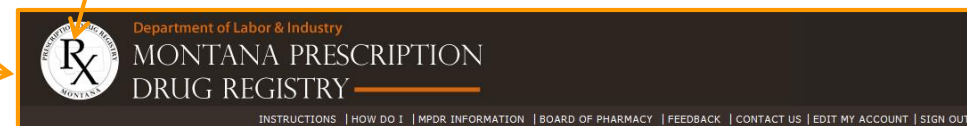
Go to the MPDR's home page: www.MPDR.mt.gov. Note that there are several links at the top of the page with information and instructions on using the MPDR program.

1. Sign in to Enroll/Manage Delegates (also called the Delegate portal).
2. The first time a Supervising Provider logs in to the Delegate portal, they will be required to acknowledge and accept the legal responsibilities that are inherent when delegating MPDR search authority to an employee.

Once a user has logged in, all MPDR screens will display a banner at the top of each page. This banner offers helpful shortcuts and options to users:



Click the MPDR logo to go back to the Home Page and switch to the Search Patient History portal. Users will not have to enter login credentials a second time.



Instructions: locate user instructions.

MPDR Information: locate, forms, training materials and tip sheets, and other MPDR-related information.

Edit My Account: edit your MPDR email address.

HOW TO MANAGE AN MPDR ACCOUNT

All MPDR Registered Users have an MPDR account that identifies the email address where MPDR-related correspondence will be delivered.

1. After logging in to the MPDR, click the "Edit My Account" link on the banner at the top of any MPDR webpage.
2. The screen shown to the right will open. Note that all fields except the email address are for display only and the values shown cannot be modified. A Registered User must contact their licensing board to revise their name or date of birth, or to update the email and postal mail addresses associated with their Montana license.
3. Enter a new email address and click "Update".
4. All future MPDR-generated emails will be delivered to the new email address.



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OVERVIEW OF THE DELEGATE MANAGEMENT SCREEN

The Supervisor's Main Screen, shown to the right, will appear when a Supervising Provider logs in to the Delegate portal.

If the Supervising Provider is also an MPDR Facility Manager or an MPDR Department Manager, a dropdown box at the top of the page will allow the user to access additional features for managing a Facility or Department. Refer to MPDR Delegate Access training documents for Facility Managers and Department Managers for additional information.

The middle portion of the screen shows all of the Supervisor's active Delegate Relationships. Users can sort information on this list by clicking the arrow in a column header.

What is the Organization Name?

The Organization Name column lists the name of the MPDR Facility / MPDR Department where a relationship is based (i.e., the 1 to 1 relationship was created by an MDPR Facility or Department Manager).

The Organization Name column is blank when an individual Supervising Provider created or modified the 1 to 1 relationship, or when the Supervisor is no longer affiliated with the organization to which the relationship was originally attached.

The bottom portion of the screen enables a Supervising Provider to create new Delegate accounts and new relationships. Refer to "How to Create New Relationships" on **Page 4** of this document for instructions on using this portion of the screen.

Select Delegate Type
I want to enroll/manage delegates for: My Personal Delegates

Reports
[Supervisor/Delegate Search History Report](#)
[Registered Delegates Report](#)

View Delegate Relationships for test, test

Show Inactive ☐ Show Blocked ☐ [Search](#)

Show entries per page: 10

Delegate Name	Delegate Id	Delegate Type	Organization Name	DOB	Email	Status	Start date	End date	Personal Data Changed	
Nolan, Joshua	86	Pharmacy Intern (PIN)		05/01	dpeterson3@mt.gov	Active	10/7/2015 12:28:57 PM		No	Edit
Nyira, Irisa	77	Other		01/01	dpeterson3@mt.gov	Active	9/28/2015 4:43:30 PM		No	Edit
Yar, Tasha	82	Scribe	Donna's Test Hospital	01/01	dpeterson3@mt.gov	Active	10/16/2015 1:13:27 PM		No	Edit

Showing 1 to 3 of 3 entries

Create A New Relationship

Search for Existing Delegate Account by:

1. Find Your Delegate by Searching:
Partial name searches are allowed.

Delegate Id
Month/Day of Birth
Last Name
First Name
Middle Initial or Name
[Search](#)

Possible Matches:

Show entries per page: 10

Delegate Id	Delegate Name	DOB
23	Smith1, John1	1/1
24	Smith2, John2	1/1
25	Smith3, John3	1/1
26	Smith4, John4	1/1
27	Smith5, John5	1/1
28	Smith6, John6	1/1
29	Smith6, John6	1/1
30	Smith8, John8	1/1
31	Smith9, John9	1/1
32	Smith10, John10	1/1

Showing 1 to 10 of 17 entries

[First](#) [Previous](#) **1** of 2 [Next](#) [Last](#)

2. Or click here if your Delegate is not in the search results.
[Create new delegate account](#)

To view inactive or blocked relationships:

Click one or both of the boxes at the top of the list of active relationships, and then click "Search." Any inactive and/or blocked relationships will be added to the list of relationships. Refer to "Managing Delegates" below to reactivate an inactive relationship.

"Blocked" means the Board of Pharmacy revoked the Delegate's MPDR access. Supervising Providers cannot reactivate or modify Blocked relationships.



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HOW TO CREATE NEW RELATIONSHIPS, PART 1 OF 2

1. Find out if the Supervisor and Delegate already have a relationship that is inactive, has expired or been blocked.
 - a. Follow the instructions on **Page 3** of this document to view expired and blocked relationships.
 - b. If an expired relationship already exists, reactivate it by following the instructions on **Page 6** of this document. Do not create a new relationship with the same Delegate.
 - c. If a blocked relationship is shown, the Delegate's MPDR privileges have been revoked by the Board of Pharmacy. This individual is not eligible to act as anyone's MPDR Delegate. Do not attempt to create a new relationship with this individual.
 - d. If no expired or blocked relationship exists, continue to Step 2.
2. If no previous relationship exists, find out if the Delegate already has an MPDR Account with an existing Delegate ID.
 - a. Search for an existing Delegate record. The Delegate may have been added to the system by another Supervising Provider, and the same Delegate ID should be used for the new relationship.
 - b. If the desired Delegate appears on the list of possible matches, click "Add" next to the person's record to open the "Create A New Supervisory Relationship" screen shown on the next page. The Delegate's existing account information will automatically be entered on the screen.
3. If the desired Delegate is not on the list of possible matches, click "Create New Delegate Account" to open the "Create A New Supervisory Relationship" screen shown on the next page.

Create A New Relationship

Search for Existing Delegate Account by:

1. Find Your Delegate by Searching:
Partial name searches are allowed.

Delegate Id

Month/Day of Birth

Last Name

First Name

Middle Initial or Name

Search

2. Or click here if your Delegate is not in the search results.
[Create new delegate account](#)

Possible Matches:

Show entries per page:
10

Delegate Id	Delegate Name	DOB	
23	Smith1, John1	1/1	Add
24	Smith2, John2	1/1	Add
25	Smith3, John3	1/1	Add
26	Smith4, John4	1/1	Add
27	Smith5, John5	1/1	Add
28	Smith6, John6	1/1	Add
29	Smith6, John6	1/1	Add
30	Smith8, John8	1/1	Add
31	Smith9, John9	1/1	Add
32	Smith10, John10	1/1	Add

Showing 1 to 10 of 17 entries
[First](#) [Previous](#) **1** of 2 [Next](#) [Last](#)

Please read "About Relationship End Dates" on the next page for important information about managing Delegate Relationships.



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HOW TO CREATE NEW RELATIONSHIPS, PART 2 OF 2

As described on the previous page, the Supervising Provider can access the “Create A New Supervisory Relationship” screen shown on this page by either of two methods:

- Searching and selecting an existing Delegate account. The system will fill in the blanks on the screen, and the Delegate will be able to log in to the MPDR with his or her existing user credentials.
- Clicking “Create New Delegate Account.” The Supervising Provider must fill out the form and the Delegate must create new MPDR login credentials.

To finalize the creation of a new relationship:

1. All fields are required except “Middle Initial or Name.”
2. Please make sure the Delegate’s email address is correct. The Delegate will receive crucial email information about this relationship.
3. All new relationships are automatically created with an “Active” status.
4. All new relationships are assigned an end date that will cause the relationship to expire 6 months after the creation date. Refer to “About Relationship End Dates” for more information about this feature.
5. Click “Save” when finished.

The MPDR service will create a new Delegate Account (if one does not already exist) and will automatically create a relationship between the Supervising Provider and the new Delegate. The new relationship will be added to the list of active relationships on the Supervisor’s Main Screen.

If a Supervising Provider discovers that a typographical error has been made after the information on this screen has been saved:

The Supervising Provider must request that the Delegate log in to the MPDR and click “Edit My Account”. The Delegate is the only person who can revise information on his or her MPDR account once it has been created.

Create a new Supervisory Relationship with the following Delegate:

Delegate Information

Enter the delegate’s month/day of birth in combination with their last and first name. Entering this data enables the system to search for existing delegate records with matching data. If the delegate is already enrolled, existing data (except End Date) fills in automatically.

Month/Day of Birth

Last Name

First Name

Middle Initial or Name

The delegate’s job type

Enter the delegate’s job type, to enable MPDR staff to track delegates by type for statistical purposes. If the delegate’s job is not included in the list, choose “Other”.

Delegate Type

Email Correspondence

Enter the email address at which the delegate should receive notification emails.

Email Address

Access Status

Status

End Date

About Relationship End Dates: All new and reactivated relationships will automatically expire after 6 months. The MPDR service will send reminder emails to the Supervising Provider and to the Delegate. Reminder emails state that the relationship will expire in 30 days, or that the relationship will expire in 7 days. The Supervising Provider can either extend the relationship, or can terminate the relationship if the Delegate is no longer an authorized representative. See [Page 6](#) of this document for instructions on how to extend or terminate a relationship.

The Supervising Provider cannot remove the relationship’s end date; however, the default end date may be altered to streamline relationship management:

- When the Delegate is a temporary employee or will only be assigned MPDR-related duties for a short time, the Supervising Provider can enter the desired end date at the time the relationship is created.
- When an employee gives advance notice that he or she is leaving employment, the Supervising Provider can enter the employee’s last date of work at the time notice is given so that the relationship will automatically terminate when the employee leaves.



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HOW TO MANAGE EXISTING RELATIONSHIPS

From the Supervisor's Main Screen, review the list of Delegate Relationships and click "Edit" on the row pertaining to the relationship being modified. The "Modify Delegate Status or End Date" screen, shown to the right, will open.

Note that changes entered on this screen will override any entries made by an MPDR Facility Manager or MPDR Department Manager.

Once the user clicks "Save Changes" the MPDR service will either extend, reactivate or terminate the relationship.

To extend a relationship that will expire in the near future (i.e., the Supervising Provider received an email saying the relationship will expire):

1. Locate the Delegate's name on the list of active relationships and click "Edit."
2. Enter a new end date no more than 6 months in the future.
3. Save changes.

To reactivate an expired or previously terminated relationship:

1. Locate the inactive relationship by selecting "Show Inactive" and clicking "Search" on the main screen.
2. Click "Edit" on the row containing the desired relationship.
3. Change the Status to "Active" and enter a new end date no more than 6 months in the future.
4. Save changes.

To terminate an active relationship immediately:

1. Locate the Delegate's name on the list of active relationships and click "Edit."
2. Change the Status to "Inactive."
3. Do not modify the end date.
4. The relationship will be deactivated as soon as this change has been saved.

Doe, John	34	Dental Assistant	Donna's Test Hospital - Internal Medicine	03/03	dpeterson3@mt.gov	Active	05/14/2015	No	Edit
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Modify Delegate Status or End Date

i Access Status defaults to "Active" in a new enrollment. The status can be changed to "Inactive" to deactivate a delegate's relationship with Supervising Provider (or with a Facility/Department set of Supervising Providers). Enter an End Date to have the delegate's relationship with the current Supervising Provider(s) expire at the end of the defined date.

Status:

End Date:

[Previous](#) [Save Changes](#)

View Delegate Relationships for test, test

Show Inactive ☐ Show Blocked ☐ [Search](#)

Show entries per page: 10

Delegate Name	Delegate Id	Delegate Type	Organization Name	DOB	Email	Status	Start date	End date	Personal Data Changed	
Nolan, Joshua	86	Pharmacy Intern (PIN)		05/01	dpeterson3@mt.gov	Active	10/7/2015 12:28:57 PM		No	Edit
Nyira, Irisa	77	Other		01/01	dpeterson3@mt.gov	Active	9/28/2015		No	Edit

To terminate an active relationship in the future:

1. Locate the Delegate's name on the list of active relationships and click "Edit."
2. Enter the desired future end date.
3. Do not modify the status – the relationship will remain active until the assigned end date.
4. The MPDR service will automatically deactivate the relationship at midnight on the assigned end date.



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HOW TO MONITOR DELEGATE ACTIVITY

Monitoring MPDR Search Activity:

Supervising Providers are required to monitor how their Delegates use the MPDR. Take the following steps to create a report of historical MPDR search activity that includes the search history of the Registered User/Supervising Provider and any Delegates:

1. From the Supervisor's Main Screen, click "Supervisor/Delegate Search History Report."
2. Enter the date range of the searches to be monitored.
3. Enter a Delegate ID to view searches by one Delegate.
4. Leave Delegate ID blank to view searches by all Delegates.

The Search History Report can be reviewed on screen, and the Supervising Provider can sort results by clicking the arrow in any column header. The Supervising Provider can also download the report in PDF, Excel or Word format for later review.

Notify the MPDR immediately if a Delegate conducted a search of someone who was not under the Supervisor's care at the time the search was conducted.

Downloading A List of Delegate Relationships:

1. From the Supervisor's Main Screen, click "Registered Delegates Report."
2. The system will display a list of all active relationships.
3. To view inactive or blocked relationships, select one or both of those boxes at the top of the list and click "Search."

The Supervising Provider can sort on-screen results by clicking the arrow in any column header. The Supervising Provider can also download the report in PDF, Excel or Word format for later review.

If a downloaded Excel file shows hashtags (###) in the date fields, expand the column width to display the dates. Refer to **Page 9** of this document for a more detailed explanation of how to remove the hashtags.

Select Delegate Type

I want to enroll/manage delegates for:

Reports

- Supervisor/Delegate Search History Report
- Registered Delegates Report

Supervisor/Delegate Search History

Date range for searches conducted:

Start date

End date

Delegate's Delegate ID

NOTE - searching without defined Delegate ID parameter will display all conducted searches, regardless of Delegate ID.

The following patients match the search criteria entered:

Show entries per page: <input type="text" value="100"/>						
Patient Name	Date Of Birth	City	Date and time of search	Searcher's name	Searcher's ID	Facility/Department name, if applicable
Doe John	9/1/1911	Helena	10/16/2015 4:36:02 PM	Winters Talia	84	
Doe John	1/1/1930	Anytown	9/28/2015 11:24:01 AM	Prince Diana	80	Donna's Test Hospital - Emergency Room
Doe Karen	2/4/1967	Helena	10/16/2015 4:35:48 PM	Winters Talia	84	
Doe Karen	2/4/1967	Helena	10/16/2015 4:28:25 PM	Peterson Donna	MED-POD-LIC-26209	
Doe John Q	10/3/1983	Helena	10/16/2015 4:27:59 PM	Peterson Donna	MED-POD-LIC-26209	

Registered Delegates: All Relationships							
Registered Delegates							
Organization Name	Delegate Name	Delegate ID	Delegate DOB	Delegate email address	Status	Start date	End date
S's Pilot Facility - Emergency Department	Nyira Irisa	77	1/1	testemail	Active	9/28/2015 4:43:30 PM	3/28/2016 12:00:00 AM
	Nyira Irisa	77	1/1	testemail	Active	11/6/2015 11:09:23 AM	3/6/2016 12:00:00 AM
C's Pilot Facility	Nyira Irisa	77	1/1	testemail	Inactive	11/6/2015 4:12:32 PM	11/28/2015 12:00:00 AM
D's Nov. Test Hospital	Nyira Irisa	77	1/1	testemail	Active	11/30/2015 11:58:46 AM	5/30/2016 12:00:00 AM
	Ivanova Susan	78	1/1	testemail	Blocked	9/28/2015 3:01:36 PM	10/8/2015 3:20:38 PM
	Wayne Bruce	79	1/1	testemail	Inactive	11/6/2015 2:27:49 PM	11/6/2015 2:27:49 PM
D's Test Hospital - Critical Care	Prince Diana	80	1/1	testemail	Inactive	10/19/2015 4:43:53 PM	10/19/2015 4:44:17 PM
Cassie's Pilot Facility	Prince Diana	80	1/1	testemail	Active	11/6/2015 5:19:59 PM	11/28/2015 12:00:00 AM



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TROUBLESHOOTING AND FREQUENTLY ASKED QUESTIONS, PART 1 OF 2

I know I have a relationship with someone; why can't I find it on my list of relationships?

Your relationship with this Delegate has probably expired or been terminated. To view expired, terminated or blocked relationships, locate the "Inactive" and "Blocked" boxes at the top of your list of active relationships. Click one or both of the boxes, and then click "Search." Any inactive and/or blocked relationships will then be added to your list of relationships.

Why does my screen list multiple relationships with the same Delegate?

1. It is possible for a Supervising Provider to have a Delegate relationship with someone by creating a 1 to 1 relationship themselves (for example, in a private sector medical office setting), and to have a separate 1 to 1 relationship with the same Delegate within an MPDR Facility or Department (for example, in a hospital setting). If this is the case, one or more of your relationships with this Delegate will have an Organization Name displayed on the Supervisor's main screen.

It is also possible for a Supervising Provider to have multiple Facility-based and/or Department-based relationships with the same individual.

If you have concerns about a Facility-based or Department-based relationship, please discuss them with the MPDR Facility or Department Manager.

2. If no Facility-based or Department-based relationships exist (i.e., none of your relationships with this Delegate are listed with an Organization Name), then you probably created multiple Delegate IDs for the same individual. If you've assigned multiple Delegate IDs, please discuss the situation with your Delegate. The two of you should reach an agreement about which ID the Delegate will use for future MPDR logins, and you should immediately terminate the relationship attached to the other Delegate ID. See [Page 6](#) of this document for instructions on how to immediately terminate a relationship

How can I separate MPDR Facility- or Department-based relationships from the ones I created myself?

Click the arrow in the Organization Name column of your list of relationships, as shown on [Page 3](#) of this document. The system will sort all of your relationships by Organization Name; since your individual relationships have no Organization Name, these relationships will be grouped together on the resulting list.

The system won't let me fix an error I made when I created a new relationship. What should I do?

1. If you created a relationship with the wrong Delegate, you should terminate the relationship immediately by following the instructions on [Page 6](#) of this document.
2. If you made a typographical error on the Delegate's name or email address, you must ask the Delegate to log in and edit his or her MPDR account to correct the error. A Supervising Provider cannot modify a Delegate's account once it has been created.

Why can't I modify a relationship that says it's Blocked?

If a relationship's status is "Blocked," this means that the Board of Pharmacy has revoked the Delegate's MPDR access privileges. This individual is no longer eligible to be a Delegate, so Supervising Providers cannot reactivate these relationships. Board of Pharmacy staff are the only ones who can reinstate the Delegate's MDPR privileges.

How can I change the name of an MPDR Facility or Department that shows on my list of relationships?

Supervising Providers cannot modify MPDR Facility or Department Names. Please contact your MPDR Facility or Department Manager to recommend a name change. These MPDR Managers are the only ones who can rename an MDPR Facility or Department.



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TROUBLESHOOTING AND FREQUENTLY ASKED QUESTIONS, PART 2 OF 2

I downloaded a report, but I can't read the dates. What's wrong?

If your Excel download shows hashtags (###) in the date fields, expand the width of the two date columns until the full date and time are displayed.

To expand a column's width, click and drag the line to the right of the column to be expanded (see the arrow on the illustration below). In newer versions of Excel, you can also double click this dividing line and Excel will automatically set the correct column width.

Organization Name	Delegate Name	Delegate ID	Delegate DOB	Delegate email address	Status	Start date	End date
Ivanova Susan		78	1/1	testemail	Blocked	#####	#####
Donna's Test Hospital - Critical Care	Prince Diana	80	1/1	testemail	Inactive	#####	#####
Wayne Bruce		79	1/1	testemail	Inactive	#####	#####
Test J Fisher		123	1/1	testemail	Inactive	#####	#####

My MPDR Department Manager created a relationship for me with a Delegate whom I do not want to authorize to search the MPDR on my behalf. What should I do?

Individual Supervising Providers always have the final authority about who is authorized to search the MPDR on their behalf. Follow the instructions on [Page 6](#) of this document to immediately terminate the relationship in question.

The MPDR service will detach the newly-terminated relationship from the MPDR Facility or Department, which means that the MPDR Facility or Department Manager cannot reactivate this relationship to you in the future. You will only be able to view this terminated relationship if you select the option that displays your inactive relationships (see [Page 3](#)).